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Monthly App Tracker – September 2026

ByteDance ventures into overseas short-drama market

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MAS rose 0.9% y-y and total monthly time spent increased 7.6% y-y in September

Monthly active smartphone (MAS) users in China rose 0.9% y-y to 1.28bn in September 2026. China's MAS has remained stable in recent months. Total monthly time spent (MTS) grew 7.6% y-y in September, decelerating from 8.1% y-y growth in September 2026.

Tencent's WorkBuddy maintains top spot among office AI agents

According to Analysys, a third-party research firm, Tencent's (700 HK, Buy) WorkBuddy remained the most popular desktop AI agent platform in China as of September 2026, with monthly visits surging to 85mn (up from 21mn as of June 2026). Alibaba's (BABA US, Buy) QwenWork, launched in early August after integrating QoderWork, MuleRun, and Wukong agents, ranked second, with 47mn monthly visits, followed by ByteDance's (unlisted) Doubao Work, officially launched on 25 August, with 30mn monthly visits in September. *An AI office industry expert* we recently spoke with noted that Tencent's WorkBuddy is currently the early leader in the consumer AI office market, while the key battleground is the enterprise market, where customers tend to have a higher willingness to pay and greater stickiness than consumer users. We expect competition to remain tense in the office agent segment as it has shown rapid adoption among consumer and corporate users while penetration is still low. We expect to see greater integration between office agents with exiting corporate collaborative SaaS products, Dingtalk, WeCom and Feishu across the industry to enable cross-selling. According to Questmobile, DingTalk had the largest daily active user (DAU) scale at 88mn (up 19% m-m but down 4% y-y) in September, followed by WeCom (owned by Tencent) at 79mn (up 12% m-m and 7% y-y) and Feishu (owned by ByteDance) at 11mn (up 8% m-m and 52% y-y).

WeChat regains title as China's most popular app

After being overtaken by ByteDance's Douyin app in the past two months in monthly time spend (MTS) share, WeChat (owned by Tencent) regained the lost title of being China's most popular app in September with an MTS share of 19.3% vs 18.5% for Douyin. But it seems to us the competition between China's top two apps is far from over – Douyin's momentum still appears strong with MTS rising 17% y-y driven by 16% increase in its DAU. This set of growth rates outshone the 1%/3% y-y for WeChat, suggesting we may see continued rotation of the top title between the two apps in the coming months. WeChat has intensified its efforts to defend its MTS share, including its latest campaign to promote its short-drama mini program, Lv Pao Pao, which streams free short-drama contents within WeChat which could help re-accelerate its stagnant time spend growth.

Tencent Music promotes light music apps to counter user loss to Soda Music

Soda Music (owned by ByteDance) maintained strong momentum in MAU (monthly active user), recording 43% y-y increase to 172mn in September. In contrast, Tencent Music's (TME US, Neutral) three flagship apps, i.e., QQ Music, Kugou Music and Kuwo Music, continued to experience user churn, with MAU declining by 5%, 14% and 16% respectively. NetEase Cloud Music's (9899 HK, Not rated) MAU remained resilient, staying flattish y-y in September.

To arrest further churn of price-sensitive users, Tencent Music started promoting more aggressively the light versions of its flagship apps with ad-centered monetization, which is different from the flagship apps' subscription-centered monetization. These light music apps include Bodian music, Kugou concept, and Kugou free version. According to Questmobile data, the MAU of Bodian music and Kugou concept version rose 77% and 21% y-y to 5mn each while the Kugou Free version's MAU rose significantly by 391% y-y to 6.5mn.



Producti C

See Appendix A-1 for analyst certification, important disclosures and the status of non-US analysts.

Based on our observations, Tencent Music is likely aiming to service its users with more targeted offering – its flagship app, in particular QQ Music continues to offer premium listening experience with superior sound quality and comprehensive content library to paying subscribers, while other apps, in particular these light apps are positioned to compete with Soda for price-conscious users. It remains to be seen whether this strategy is effective in stabilizing TME's overall user base as Soda has gained a strong mind share already as the free music-streaming app in addition to the strong backing from Douyin.

ByteDance aspires to replicate short-drama success overseas

According to Questmobile, Hongguo, the short-drama app owned by ByteDance, continued to deliver strong growth with DAU surging 127% y-y to 203mn. Meanwhile, its MTS surged 210% y-y, with time spent share (as a percentage of total monthly mobile time spent by Chinese mobile users) rising to 6.9% from 2.4% a year ago. ByteDance is leveraging short dramas (both live-action and AI-generated) to capture Chinese mobile users' attention and time spent, and the company seems to want to replicate this success in overseas regions.

Building on its huge success in the home market, ByteDance launched a short-drama app PineDrama in early 2026 for its overseas audience. With strong traffic support from TikTok and the production boost from its own AI video generation tool, Seedance, the MAU of PineDrama surged 15.6% m-m to 38mn in September, marking the fastest user growth among overseas short drama apps developed by Chinese players, according to SensorTower. In terms of MAU scale, PineDrama is lagging behind those early movers such as ReelShort with 80mn MAUs and DramaBox with MAU of 79mn. However, PineDrama's users spend longer time on its app. Based on SensorTower, the MTS on PineDrama reached 377 minutes, much higher than ReelShort's 68 minutes and DramaBox's 70 minutes in September, suggesting stronger user stickiness. Geographically, the top three countries contributing to PineDrama's MAU are Indonesia (41% of total MAU), Brazil (28%) and USA (13%).

Overview of leading Chinese apps

Much of the traffic flow in September 2026 was dominated by apps owned by ByteDance, Tencent, Baidu (BIDU US, Buy), and Alibaba. In particular, ByteDance's apps took five spots among the Top-20 in terms of both monthly active users (MAU) and time spent share in September, according to QuestMobile. Tencent's Wechat app reclaimed the top spot with a 19.3% share in terms of time spent by Chinese mobile users, followed by ByteDance's Douyin with 18.5% time-spent share. ByteDance's Red Fruit Free Short Drama (Hongguo) app ranked third, with a 6.9% time-spent share.

Fig. 1: Top-20 apps in China, by MAU and time spent – September

Top 20 Apps in MAU: MAUs change and penetration

App Name	Rank M-M chg	Penetration	Penetration Y-Y	Penetration M-M
WeChat	-	91.0%	3.1ppt	0.4ppt
Douyin	-	80.3%	6.5ppt	-0.1ppt
Taobao	-	76.0%	-1.4ppt	0.1ppt
Alipay	-	75.2%	0.1ppt	0.8ppt
Amap	-	71.8%	-2.8ppt	-2.3ppt
Pinduoduo	-	56.2%	0.5ppt	-0.2ppt
Sogou Keyboard	-	53.8%	2.8ppt	-0.5ppt
JD	↑	49.9%	1.8ppt	0.5ppt
QQ	↓	49.1%	-0.3ppt	-1.0ppt
Baidu	-	47.2%	-6.5ppt	-1.6ppt
Baidu Maps	-	43.0%	-2.7ppt	-0.7ppt
Meituan	-	41.3%	0.5ppt	-0.4ppt
Baidu Keyboard	-	38.6%	-0.4ppt	0.0ppt
Weibo	-	38.0%	0.0ppt	0.8ppt
Kuaishou	-	34.7%	-1.4ppt	-1.0ppt
Red Fruit Free Short Drama	↑	33.5%	14.9ppt	1.3ppt
Doubao	↓	32.7%	19.2ppt	0.3ppt
Toutiao	-	27.2%	-3.4ppt	-1.4ppt
Douyin Lite	-	26.2%	2.2ppt	0.0ppt
QQ Browser	↑	25.0%	-6.2ppt	0.4ppt

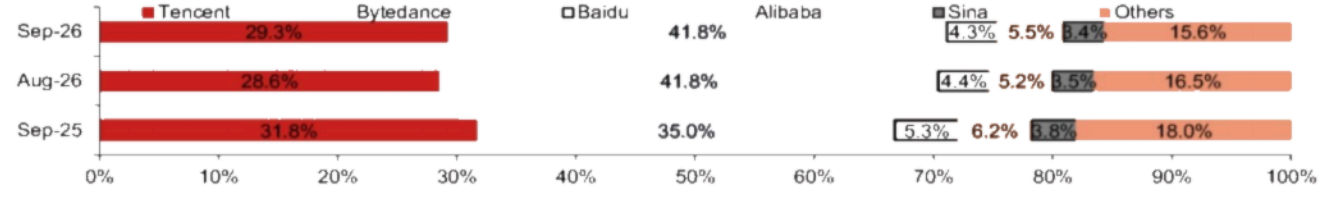
Time spent share for top 20 Chinese mobile apps in September

App Name	Rank M-M chg	Time spent share	Time spent share Y-Y	Time spent share M-M
WeChat	↑	19.3%	-1.3ppt	0.9ppt
Douyin	↓	18.5%	1.4ppt	-0.8ppt
Red Fruit Free Short Drama	↑	6.9%	4.5ppt	1.0ppt
Douyin Lite	↓	6.1%	0.5ppt	-0.1ppt
Kuaishou	-	3.4%	-1.0ppt	-0.4ppt
Sogou Keyboard	-	3.0%	-0.1ppt	0.0ppt
Toutiao	-	2.5%	-0.6ppt	0.0ppt
rednote	-	2.3%	-0.1ppt	-0.1ppt
Pinduoduo	↑	2.3%	0.1ppt	0.1ppt
Kuaishou Express	↓	2.0%	-0.3ppt	-0.2ppt
Fanqie Free Novels	-	2.0%	0.0ppt	0.0ppt
Baidu Keyboard	↑	1.9%	-0.1ppt	0.1ppt
Weibo	↓	1.8%	-0.3ppt	-0.1ppt
Bilibili	-	1.6%	-0.1ppt	-0.1ppt
Taobao	-	1.6%	-0.3ppt	0.1ppt
Sina News	-	1.4%	0.0ppt	0.0ppt
Baidu	-	1.3%	-0.5ppt	0.0ppt
Alipay	↑	1.2%	0.0ppt	0.0ppt
Honour of Kings	↓	1.0%	0.0ppt	-0.3ppt
Amap	-	1.0%	0.0ppt	-0.1ppt

Source: QuestMobile, Nomura research

Among the Top-50 apps, which accounted for ~93% of the total mobile time spent in China during September, we note that the ByteDance group gained time-spent share on a y-y basis, which rose from 35% in September 2025 to 41.8% in September 2026, surpassing Tencent camp's 29.3% (down from 31.8% a year ago). Sequentially, ByteDance's time-spent share was flat, while Tencent's time-spent share was up 0.7pp m-m.

Fig. 2: Time-spent share of various internet camps among the Top-50 apps in China



Source: QuestMobile, Nomura research

Long-form vs short-form dramas

Long-form video apps remained weak in September. The MTS of Tencent Video, iQIYI (IQ US, Neutral) and Mango TV (300413 CH, Not rated) recorded declines of 35%, 35% and 27% y-y, respectively, mainly dragged by 26%/29% and 15% y-y declines in DAU. Youku (owned by Alibaba) bucked the trend thanks to the release of blockbuster title *the Early Spring*. Its MTS recovered to 5% y-y growth in September, backed by 4% y-y rose in DAU.

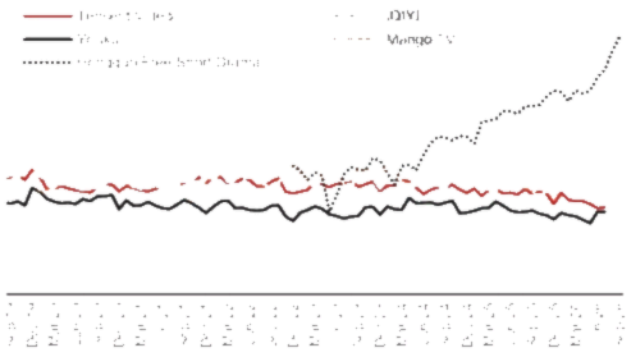
The dominant short-form drama app – Hongguo Free Short Drama (owned by ByteDance) – sustained its strong growth trend with an MTS increase of 210%, backed by 127% growth in DAU and 36% growth in DTSD.

Fig. 3: DAUs of long-form vs short-form dramas apps



Source: QuestMobile, Nomura research

Fig. 4: Average daily time spent per user

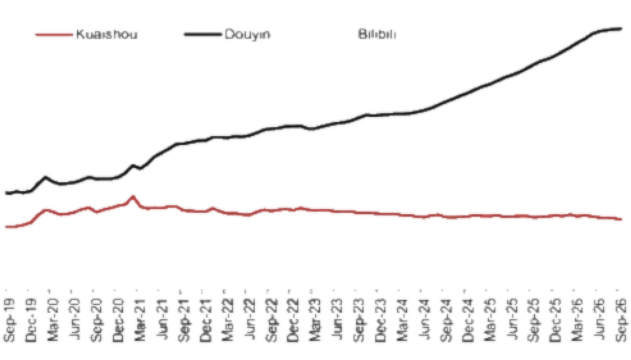


Source: QuestMobile, Nomura research

Short video

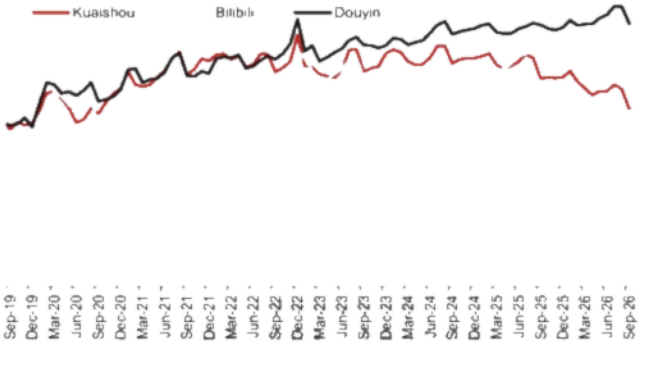
The gap in MTS between Douyin and Kuaishou (1024 HK, Neutral) has widened. In September, Douyin maintained its solid growth momentum in terms of MTS, at 17% y-y, mainly driven by 16% growth in DAU. However, Kuaishou continued its relatively soft performance, with a decline of 17% y-y in MTS, mainly dragged by a 15% y-y decline in DTSD. Total time spent for Bilibili (BILI US, Neutral) recorded 3% y-y growth in September, driven by 3% y-y growth in DAU.

Fig. 5: DAUs of short video apps



Source: QuestMobile, Nomura research

Fig. 6: Average daily time spent per user



Source: QuestMobile, Nomura research

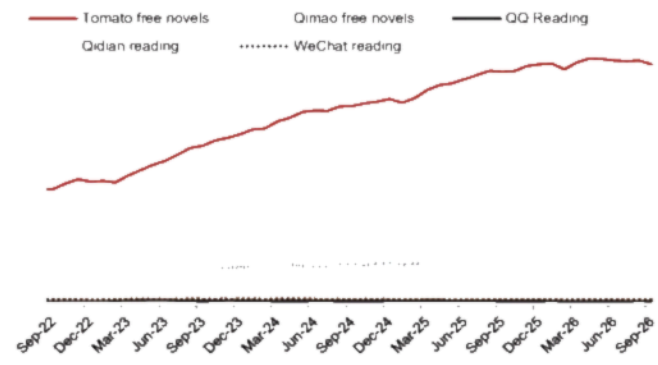
Online reading

The MTS of the free reading app leader Tomato Free Novels (unlisted; owned by ByteDance) recorded 9% y-y growth in September, backed by 3% y-y increase in DAU and 6% y-y rise in DTSD. Another free reading app, Qimao Free Novels (owned by Baidu) continued its downward trend with a 50% y-y decline in total time spent, dragged by 33% and 26% y-y declines in DAU and DTSD, respectively. Tomato Free Novels hit 142mn DAU in September, 11x DAU of the Qimao Free Novels.

Paid reading apps owned by China Literature (772 HK, Neutral), i.e., Qidian reading and

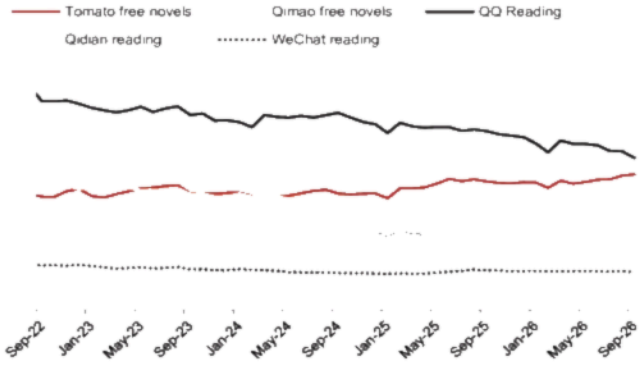
QQ reading also appeared soft user engagements, recording respective declines of 10% and 2% on a y-y basis in DAU during the month, and their DTSDs were down by 12% and 15% y-y, respectively.

Fig. 7: DAU of online reading platforms



Source: QuestMobile, Nomura research

Fig. 8: Average daily time spent per DAU of online reading platforms



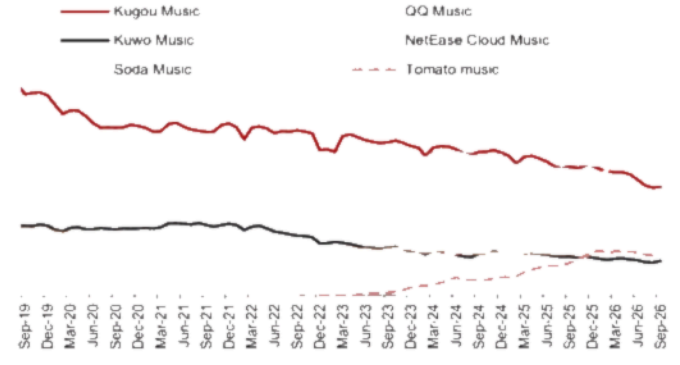
Source: QuestMobile, Nomura research

Music

Soda Music and Tomato Music (both owned by ByteDance) maintained growth momentum in DAU, recording 54% and 27% y-y, respectively, in September. NetEase Cloud Music remained resilient, with 2% y-y growth of DAU in September. However, the music apps (owned by TME), i.e. QQ Music/Kugou Music/Kuwo Music were experiencing user churn, were down 6%/16%/11% y-y in terms of DAU in September (as shown in *Fig. 9*).

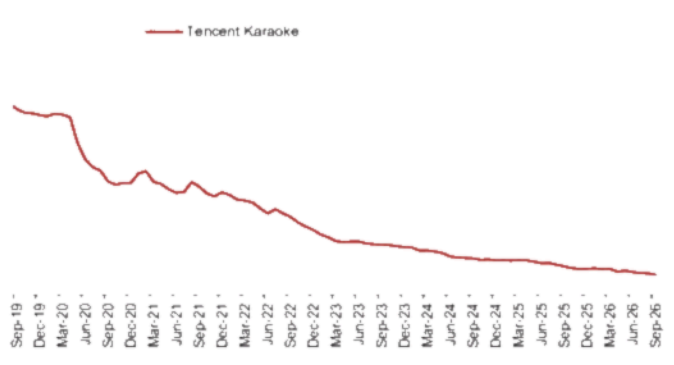
Tencent Karaoke maintained its y-y downward trend in MTS, with a 21% y-y decline, mainly dragged by a 29% y-y drop in DAU, offsetting 12% y-y growth in DTSD in September (as shown in *Fig. 10*).

Fig. 9: DAUs of music streaming apps



Source: QuestMobile, Nomura research

Fig. 10: DAUs of online karaoke app

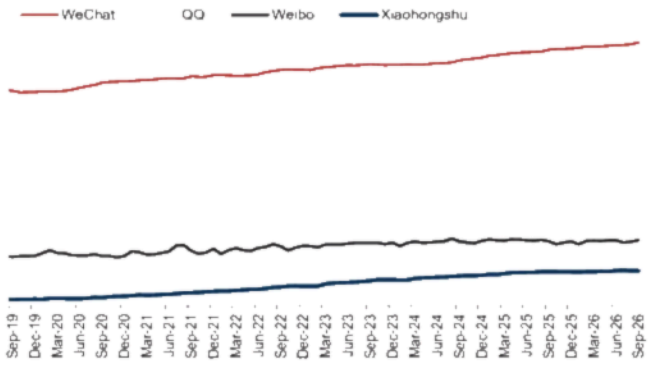


Source: QuestMobile, Nomura research

Social

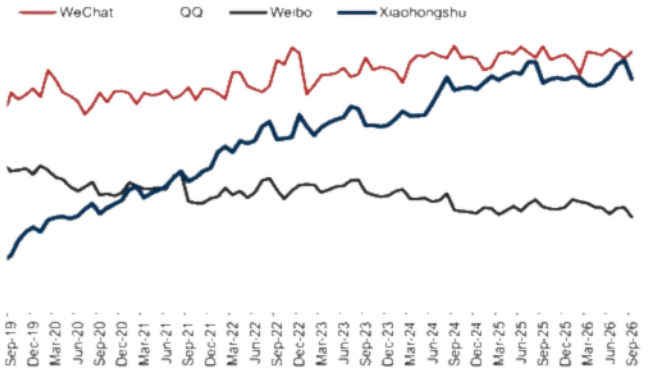
The MTS of Xiaohongshu (unlisted) recorded 4% y-y growth in September, driven by 2% y-y growth in DAU and 2% rise in DTSD. The MTS of Weibo (WB US, Neutral) declined 8% y-y in September, dragged by a 10% decline in DTSD, offsetting 1% y-y growth in DAU. Within Tencent's social ecosystem, QQ ended its past y-y decline trend and recorded flat in MTS, while WeChat recorded 1% y-y growth in terms of total time spent in September.

Fig. 11: DAUs of social apps



Source: QuestMobile, Nomura research

Fig. 12: Average daily time spent per user

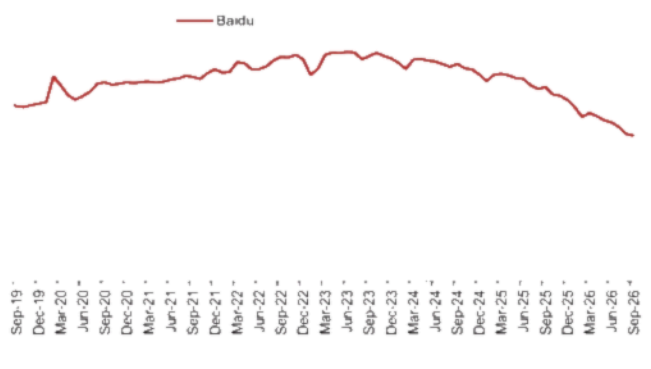


Source: QuestMobile, Nomura research

Search

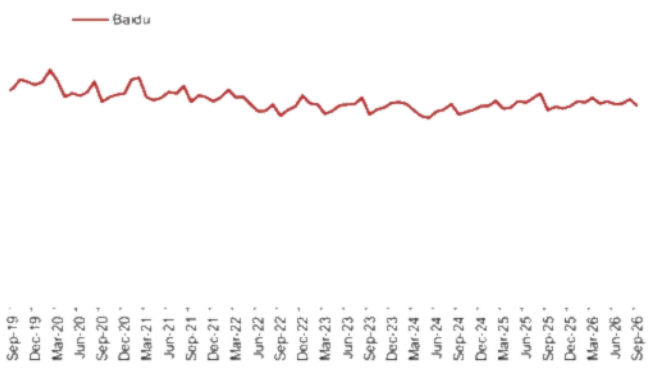
The Baidu app, despite being a dominant search engine in China, witnessed a 23% y-y decline in MTS in September, dragged by a 25% y-y decline in DAU, offsetting 2% y-y rise in DTSD.

Fig. 13: DAU of Baidu app



Source: QuestMobile, Nomura research

Fig. 14: Average daily time spent per user

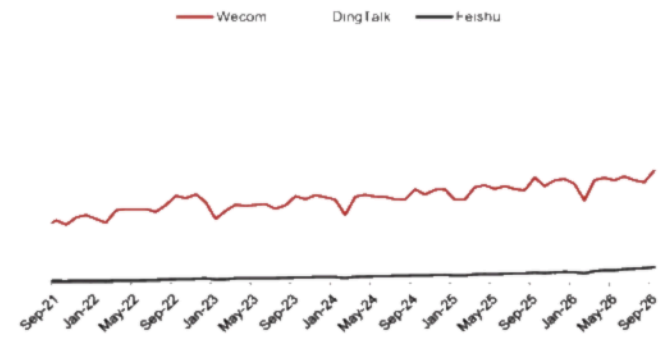


Source: QuestMobile, Nomura research

Office apps

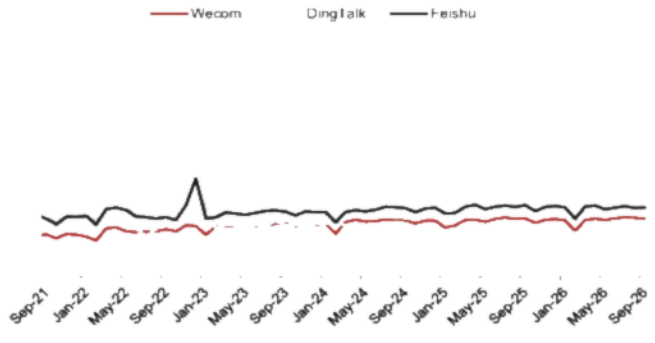
Within the office apps vertical, the DAU of Feishu (owned by ByteDance) and Wecom (owned by Tencent) recorded 52% y-y and 7% y-y growth, respectively, in September, while DingTalk (owned by BABA) recorded 4% y-y decline. However, DingTalk owned the largest DAU base at ~88mn, which was 1.1x and 8.0x that of Wecom and Feishu, respectively. For Feishu, the DTSD was at 14.5 minutes (down 3% y-y), followed by Wecom's 12.2 minutes (down 1% y-y) and DingTalk's 10.3 minutes (down 6% y-y), as per QuestMobile data.

Fig. 15: DAUs of office business apps



Source: QuestMobile, Nomura research

Fig. 16: Average daily time spent per user



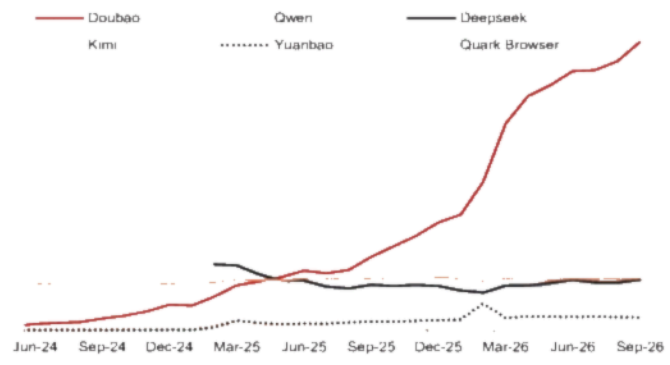
Source: QuestMobile, Nomura research

AI tools

The DAU of Doubao (owned by ByteDance) ranked first in September at 186mn (according to QuestMobile data), representing 2.9x y-y and 7% m-m growth. This was followed by Quark Browser at 34mn (up 1% y-y and 3% m-m), Deepseek (unlisted) at 33mn (up 10% y-y and 6% m-m), and Qwen (owned by Alibaba) at 29mn (up 76x y-y and 5% m-m).

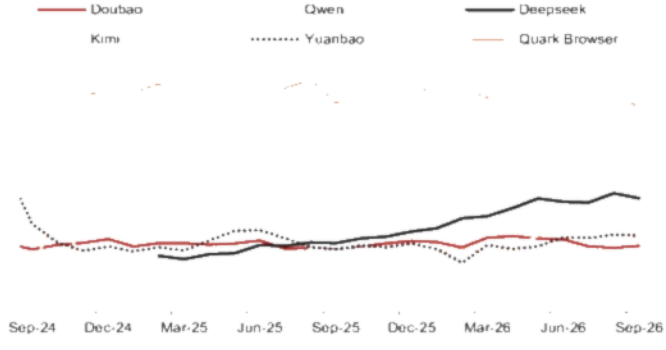
In terms of DTSD, Quark Browser recorded the highest time spent at 31 minutes in September (down 2% y-y and 6% m-m), which was followed by Deepseek at 17.2 minutes (up 66% y-y but down 4% m-m). In contrast, Yuanbao's (owned by Tencent) DTSD reached 11.6 minutes, up 22% y-y but down 1% m-m, and Doubao's at 10 minutes, up 6% y-y and 3% m-m. Among these AI tools, Qwen's DTSD recorded a relatively low level at 4.1 minutes in September, down 56% y-y but up 5% m-m.

Fig. 17: DAUs of AI apps



Source: QuestMobile, Nomura research

Fig. 18: Average daily time spent per DAU of AI apps

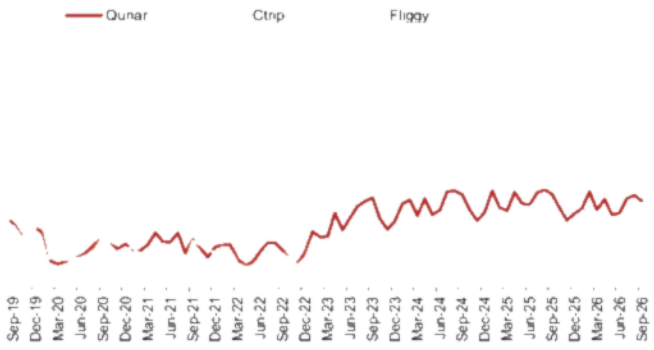


Source: QuestMobile, Nomura research

Online travel

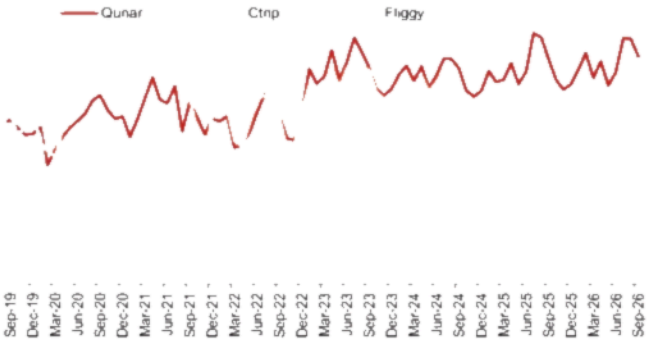
Among online travel apps, TRIP.com's (TCOM US, Neutral) domestic apps, Ctrip and Qunar recorded 17% and 7% y-y declines in MTS in September, respectively, mainly dragged by corresponding 13% and 7% y-y declines in DAU. Fliggy (unlisted, owned by BABA) declined 6% y-y in MTS, dragged by 15% y-y decline in DTSD, offsetting 10% y-y growth in DAU.

Fig. 19: DAUs of online travel apps



Source: QuestMobile, Nomura research

Fig. 20: Average daily time spent per user



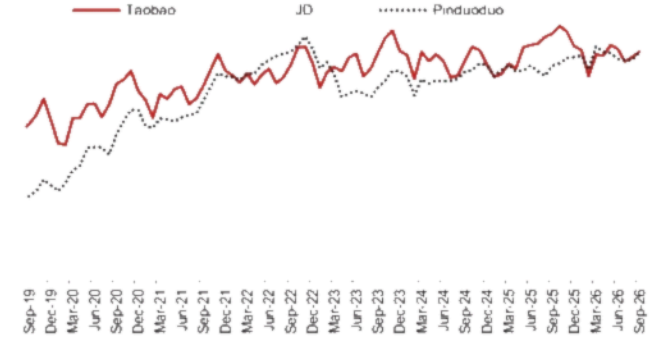
Source: QuestMobile, Nomura research

E-commerce

Alibaba's Taobao app and Pinduoduo (PDD US, Neutral) app were the top-two e-commerce names in terms of users and total time spent. Pinduoduo's DAU recorded 6% y-y growth in September, mainly backed by 17% y-y growth in the number of casual users (daily time spent <1 minute) and the number of hardcore users (daily time spent >1 minute) recorded 4% y-y growth. JD app's (JD US, Buy) DAU increased 4% y-y, mainly backed by a 21% y-y growth in the number of casual users. However, Taobao's DAU decrease of 7% y-y was dragged by a 13% decline in the number of hardcore users, offsetting 14% y-y growth in the number of casual users.

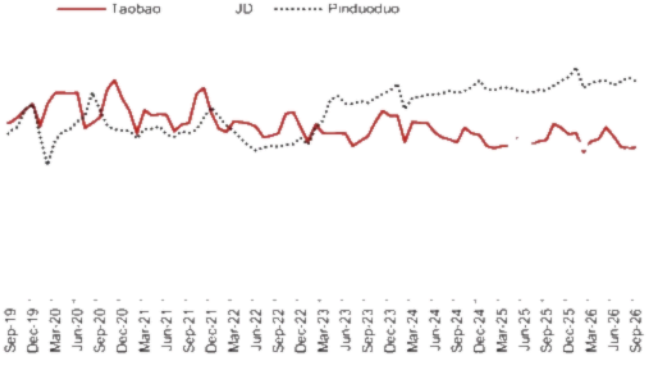
In terms of DTSD, PDD delivered 4% y-y growth in September, while Taobao and JD app recorded 5% and 4% y-y declines, respectively.

Fig. 21: DAUs of China e-commerce apps



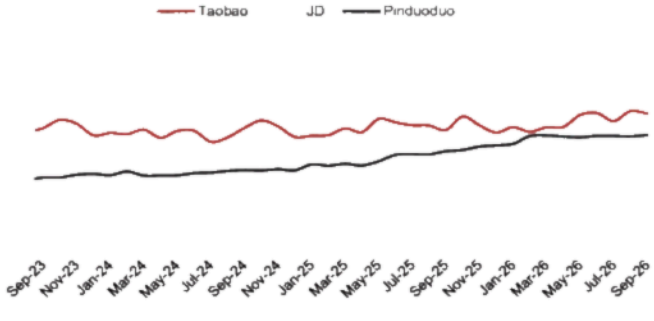
Source: QuestMobile, Nomura research

Fig. 22: Average daily time spent per user



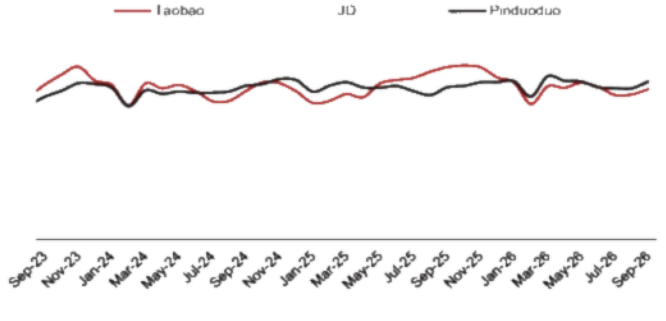
Source: QuestMobile, Nomura research

Fig. 23: Number of users with daily time spent at <1 minute



Source: QuestMobile, Nomura research

Fig. 24: Number of users with daily time spent at >1 minute

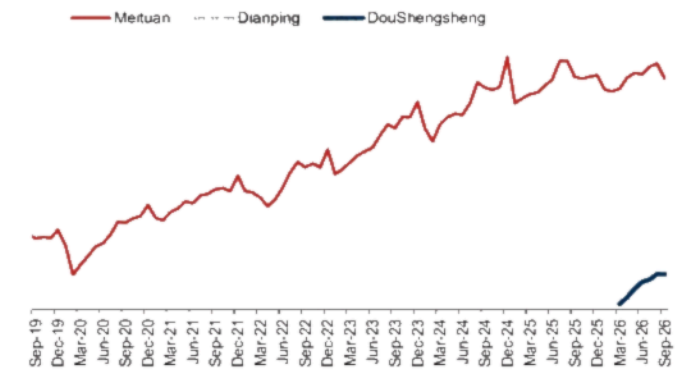


Source: QuestMobile, Nomura research

O2O

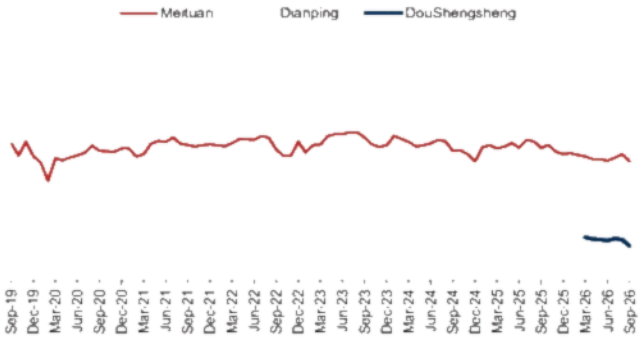
The Meituan app [owned by Meituan (3690 HK, Buy)] recorded 11% y-y decline in MTS in September, mainly dragged by 10% y-y declines in DTSD. The Dianping app (owned by Meituan) remained flat y-y in MTS, backed by a 17% y-y decline in DTSD, offsetting 21% growth in DAU. Since its launch in February this year, ByteDance's Doushengsheng (DSS) app has gradually closed the gap with Dianping app in terms of DAU, reaching 27mn (flattish m-m) in September, vs Dianping's 36mn (down 9% m-m). Both platforms' DAU remain materially lower than Meituan app's 172mn DAU (down 6% m-m). Besides, the DTSD of DSS app dropped 15% m-m to 4 minutes, and Dianping's reduced 4% m-m to 7.9 minutes. Both were below Meituan app's 13 minutes (down 6% m-m).

Fig. 25: DAUs of Meituan and Dianping



Source: QuestMobile, Nomura research

Fig. 26: Average daily time spent per user

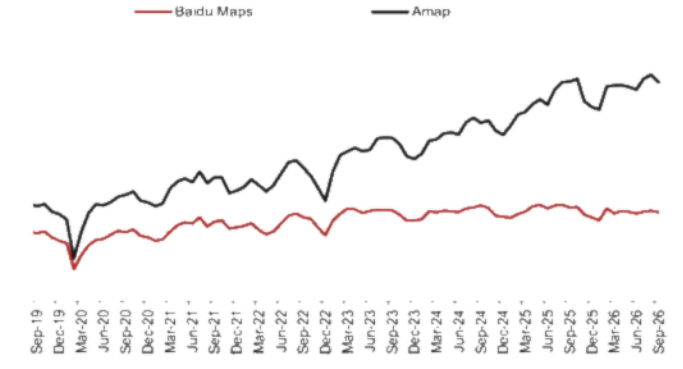


Source: QuestMobile, Nomura research

Mobile map apps

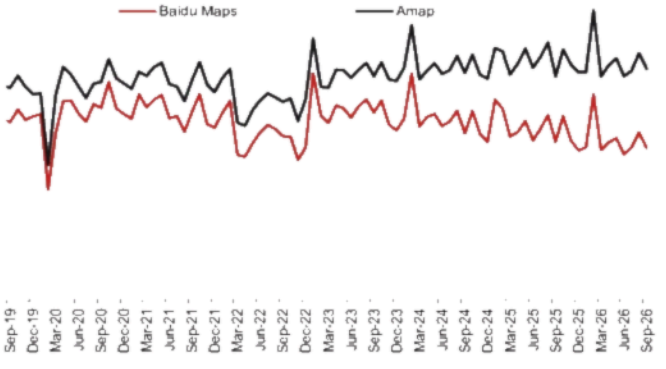
Total time spent on Baidu Maps declined 9% y-y in September, dragged by a 4% decline in DTSD and a 5% decline in DAU. The MTS of Amap (owned by BABA) rose 4% y-y in September, backed by a 4% y-y increase in DTSD. Amap's DAU has trended upward amid fluctuations, while Baidu Maps' DAU stayed relatively flat over years, resulting in a growing DAU gap between the two mapping apps.

Fig. 27: DAUs of Baidu Maps and Amap



Source: QuestMobile, Nomura research

Fig. 28: Average daily time spent per user



Source: QuestMobile, Nomura research

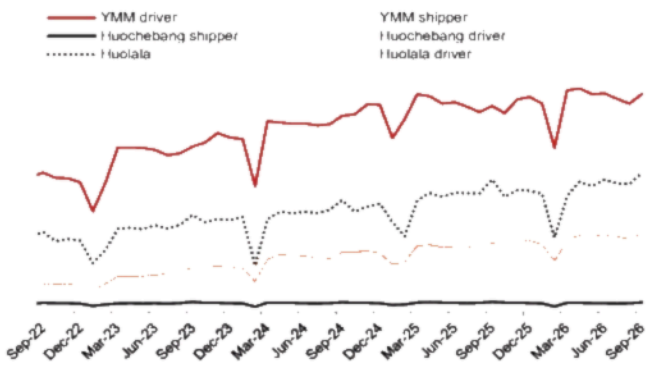
Digital freight apps

On the shipper side, the MTS of YMM Shipper (owned by Full Truck Alliance, FTA [YMM US, Buy]) and Huolala (unlisted) recorded each 10% y-y growth, mainly driven by 3% and 5% y-y growth, respectively, in DAU. However, Huochebang Shipper (owned by FTA) remained flat y-y in MTS in September, backed by a 5% y-y rise in DTSD, offsetting 4% y-y decline in DAU.

On the driver side, YMM Driver (owned by FTA) recorded 14% y-y growth in MTS in September, driven by a 7% rise in DTSD and 6% rise in DAU; Huolala Driver's (unlisted) MTS increased 29%, thanks to 14% y-y growth in DAU and 12% y-y growth in DTSD. While Huochebang Driver (owned by FTA) recorded a 4% y-y decline in MTS, dragged by

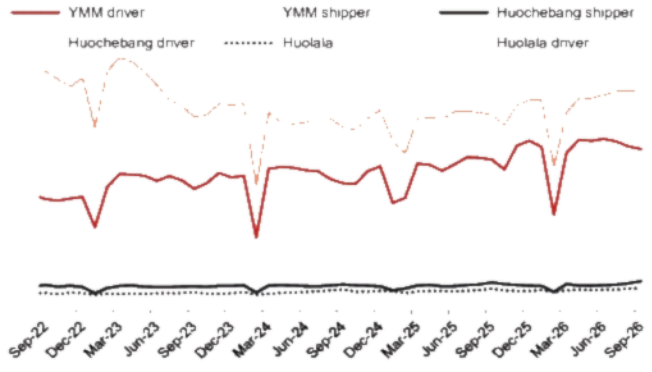
an 8% y-y decline in DAU, offsetting 4% y-y growth in DTSD.

Fig. 29: DAUs of digital freight apps



Source: QuestMobile, Nomura research

Fig. 30: Average daily time spent per user

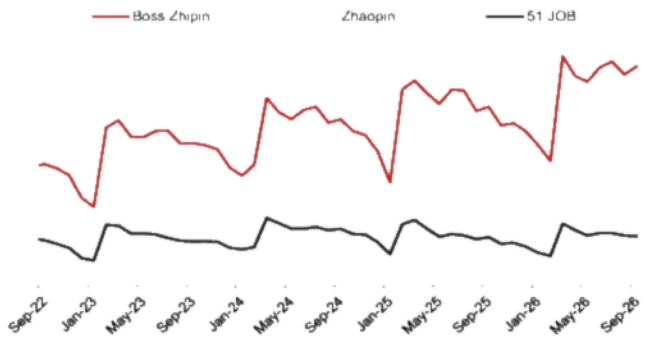


Source: QuestMobile, Nomura research

Online recruitment apps

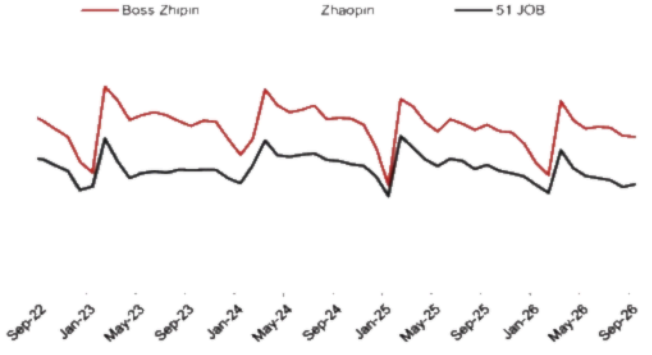
Boss Zhipin app (owned by Kanzhun [BZ US, Not rated]), one of the leading players in the online recruitment industry, recorded 15% y-y growth in MTS in September, driven by 23% y-y growth in DAU, offsetting a 7% y-y decline in DTSD. However, the MTS of Zhaopin (unlisted) and 51Job (unlisted) decreased a respective 5% and 12% y-y in September, primarily dragged by corresponding declines of 9% and 15% in DTSD, offsetting respective 4% and 3% y-y rise in DAU.

Fig. 31: DAUs of online recruitment apps



Source: QuestMobile, Nomura research

Fig. 32: Average daily time spent per user



Source: QuestMobile, Nomura research